



Supervisors/Managers

How Do I Guide

Assignments

Assignments/Approvals


How Do I...?	Selections	Tips & Guidelines
Assign case	<ul style="list-style-type: none"> On the Cases outline, click the Action icon next to appropriate Case icon. Click the Assignment icon. Click the Actions link for an assignment row. On the Actions page, select Create Assignment and click Continue. Enter the applicable data/values. Click the radio button for the new supervisor or worker name for which the assignment is being created. 	<i>eWiSACWIS automatically generates an email to the workers to notify them of the new assignment.</i>
Reassign case	<ul style="list-style-type: none"> On the Workers outline, click the supervisor desk icon to expand the outline to the worker currently assigned to the case. Click on the worker icon to bring up the list of cases assigned to the worker. Click the Actions link for the appropriate case. Select the Assignment Maintenance radio button and click Continue. Enter the applicable data/values. Click the Reassign or Reassign All button. Enter the applicable data/values. Select the radio button for the new worker name for the Assignment Details/Worker field. Click the Assign button. 	<i>eWiSACWIS automatically generates an email to the workers to notify them of the re-assignment.</i>
Close assignment without reassigning another worker	<ul style="list-style-type: none"> On the Workers outline, click the supervisor desk icon to expand the outline to the worker currently assigned to the case. Click on the worker icon to bring up the list of cases assigned to the worker. Click the Actions link for the appropriate case. Select the Assignment Maintenance radio button and click Continue. Select the Close radio button. Click Save and Close 	<i>Assignment cannot be closed if incomplete approvals exist.</i>
Close assignment to yourself, another supervisor, secondary worker, administrative worker if you have assignment to case	<ul style="list-style-type: none"> On the Cases outline, click the appropriate Case icon. Click the Assignment icon. Click the appropriate worker name. On the Worker Assignment page, click the Close radio button and click Save and then Close. 	<i>Assignment cannot be closed if incomplete approvals exist.</i>
Reassign ticklers via assignment process (current assignment open)	<ul style="list-style-type: none"> On the Tickler Reassignment page, select the applicable ticklers. Click Save and Close. 	<i>Tickler Reassignment page automatically displays when Current Worker Status <u>Do Not Close</u> radio button is selected.</i>
Reassign ticklers via assignment process (current assignment closed)	<ul style="list-style-type: none"> On the Worker Assignment page, click applicable worker. Click OK. 	<i>Worker Assignment page automatically displays when Current Worker Status <u>Close</u> radio button is selected.</i>



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Approvals

Approve case/provider work	<ul style="list-style-type: none"> On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the applicable pending approval item. On the applicable page, select Approval from the Options list and click the Go button. <i>Note: The Pending Approvals  displays with the desk icon and your name.</i> 	<p><i>Approval Decision selections:</i></p> <p><i>Approve-to approve the work and forward for Supervisory Approval, if needed;</i></p> <p><i>Not Approve-to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved.</i></p> <p><i>Reroute-to forward work for approval to another worker using the Create Worker Assignment page.</i></p> <p><i>Recall/Return-to recall or return work that has been submitted for approval. Work is recalled when any item on the page is changed. The approval process must be re-initiated.</i></p> <p><i>View-to view the approval history for a piece of work.</i></p>
View approval history	<ul style="list-style-type: none"> On the Approvals expando, expand the Approvals History icon to view the applicable approval item, or On applicable page, select Approval from the Options drop-down and click the Go button. 	<p><i>This will allow you to view the progress through the approval chain.</i></p> <p><i>Initial Status/Initial Action: Item has been created by original worker but not approved</i></p> <p><i>Pending Status/Approved Action: Item is in Pending status in the approval process but has been approved by original worker</i></p> <p><i>Pending Status/Received Action: Item is in Pending status in the approval process but has been received by next approver or supervisor</i></p> <p><i>Approved Status/Approved Action: Item has completed the approval process</i></p> <p><i>After 4 days the approved work will be removed from the Approvals in Progress outliner.</i></p>
Add/view approval comments	<ul style="list-style-type: none"> On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the Actions link on the applicable approval. On the Actions pop-up page, select Comments. Click the Continue button. Add/view comments in the free form text box and click the Save button. Click Close. 	<p><i>Approval rows with comments will be displayed with a pencil icon.</i></p>



WiSACWIS Help Desk (866) 335-2180
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WiSACWIS Knowledge Web

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm



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Case Actions

How Do I...?	Selections	Tips & Guidelines
Change Services Intake to a Protective Services Report	<ul style="list-style-type: none"> On the Services Intake page/Participant tab, select 'Change to PS Report' in the Options list. Click Go. A message displays indicating the Services Intake will be changed to a Protective Services Report. Click Yes to continue and create the PS Report. On the Protective Services Report page, enter the applicable data/values. 	<p><i>Prior to making the intake screening decision, you can change a Services Intake to a PS Report and retain the intake participants by selecting the 'Change to PS Report' option.</i></p> <p><i>Information contained in the Service Intake Summary and Service Intake Referral Information templates will be available as view only in the PS Report created as a result of the intake change.</i></p>
Change Protective Services Report to a Services Intake	<ul style="list-style-type: none"> On the Protective Services Report page/Participant tab, select 'Change to Services Intake' in the Options list. Click Go. A message displays indicating the Protective Services Report will be changed to a Services Intake. Click Yes to continue and create the Services Intake. On the Services Intake page, enter the applicable data/values. <p><i>Note: The Services Intake Type defaults to 'Child Welfare - Other' as a result of the intake change. When the Services Intake is first saved, the Services Intake Type will be frozen.</i></p>	<p><i>Prior to making the intake screening decision, you can change a Protective Services Report to a Services Intake and retain the intake participants by selecting the 'Change to Services Intake' option.</i></p> <p><i>Information contained in the PS Report Narrative template will be available as view only in the Services Intake created as a result of the intake change.</i></p>
Link services intake to a case or create new case	<ul style="list-style-type: none"> On the Intakes expando, click the pending services intake. On the Basic tab, click the "Screen In" radio button and applicable "Reason" field value. Click the Create/Link Case link. On the Search Case page: <ul style="list-style-type: none"> For a match: Click the radio button for the appropriate case and click the Link button. For no match: Click the Create button and enter the applicable data/values on the Maintain Case page. 	<p><i>When a new case is created, a supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.</i></p> <p><i>Service Intake types of Re-open to Merge Case, Re-open Case/Closed in Error, or Re-open/Update AFCARS Data, when linked to an existing closed case, will re-open the closed case.</i></p>
Link PS report to a case or create new case	<ul style="list-style-type: none"> On the Intakes expando, click the pending PS report. On the Decision tab, click "Screen In" radio button and applicable "Screen In" field value. Click the Create/Link Case link. On the Search Case page: <ul style="list-style-type: none"> For a match: Click the appropriate case and click the Link button. For no match: Click the Create button and enter the applicable data/values on the Maintain Case page. 	<p><i>When a new case is created, a supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.</i></p>
De-link a mistakenly linked intake from a case	<ul style="list-style-type: none"> On the Cases outliner, click on the case name link. On the Maintain Case page, select Delink Intake from the Options list and click Go. Select the applicable referral/intake, click Save and then click Close. 	



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Remove person mistakenly added to a case

- On the Cases outline, click on the case name link.
- On the Maintain Case page, select the Remove link for the appropriate participant to be removed.
- Click save and then click Close.

Only a supervisor can remove a participant if he/she had been erroneously added to a case and the participant is not associated with any open case work.

A worker or a supervisor can deactivate a participant if he/she will be a participant in the case but just not an active participant. Please see the Case Maintenance How Do I guide for more information on deactivating a participant.

Tickler Management

Tickler Management

How Do I...?

Selections

Tips & Guidelines

Tickler Reassignment

- Click Utilities > Tickler Management
- The Tickler Management page displays. Select the Tickler Reassignment radio button.
- In the Worker field, select the worker who has ticklers that need to be reassigned.
- In the Case/Provider field, select the case or provider that has ticklers to be reassigned.
- The Tickler Reassignment group box will display all ticklers that can be reassigned for the case.
- For each tickler to be reassigned, select the appropriate worker in the corresponding Reassign Tickler To field.
- Click Save.

Supervisors can only reassign ticklers for his/her own workers.

Ticklers can only be reassigned to another worker who has an open active assignment to the case or provider the tickler is for.

AFCARS ticklers cannot be reassigned.

Tickler Deletion

- Click Utilities > Tickler Management
- The Tickler Management page displays. Select the Tickler Deletion radio button.
- The Tickler Deletion group box displays.
- In the Worker field, select the worker who has ticklers that need to be deleted.
- The Tickler Deletion groupbox updates to reflect the ticklers available for deletion.
- Click the Delete checkbox for each tickler to be deleted.
- Click Save.

Supervisors can only delete ticklers for his/her own workers.

Supervisors cannot delete their own ticklers.

AFCARS ticklers cannot be deleted.

View Case/Provider Ticklers from Worker outline

- On the Workers outline, click the supervisor desk icon to expand the outline to view all workers.
- Click the Worker icon to expand the appropriate worker who is assigned to the case or provider.
- Click on the Actions link for the appropriate case or provider.
- Select the View Ticklers radio button and click Continue.

View Case/Provider Ticklers from Case/Provider outline

- On the Case or Provider outline, click the Actions link for the appropriate case or provider.
- Select the View Ticklers radio button and click Continue.



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Worker Information		
Worker Information	How Do I...?	Selections
	Establish new worker record	<ul style="list-style-type: none"> Click Maintain > Worker. On the Maintain Worker Information page, click the Search link by the Name field. On the Search Person page, enter the applicable data/fields and click the Search button. <ul style="list-style-type: none"> For a match: Select the applicable worker and click OK. For no match: Click the Create button and enter the applicable data/values on the Person Management page. Click Save. Click Close. Click Continue. After successfully matching the worker, enter any additional data/values on the Maintain Worker Information page.
	Change name of supervisor on worker's record	<ul style="list-style-type: none"> On the Maintain Worker Information page for the applicable worker, click the Search link by the Supervisor Name field. On the Worker Search page, enter the applicable data fields/values. Click the Search button. Select the radio button for the appropriate supervisor. Click Continue.
	Update worker name	<ul style="list-style-type: none"> On the Workers outliner, click the supervisor desk icon to expand the outliner to view all workers. Click on the Actions link for the appropriate worker. Select the Person Management radio button and click Continue. Enter/update the applicable data fields/values. Click Save and click Close.
	View/update training history information	<ul style="list-style-type: none"> On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers. Click the worker's name link. On the Worker Information page/Individual Training History tab, click the Insert button. In the Worker Training Information box, enter the applicable data fields/values.
	View/update training plan information	<ul style="list-style-type: none"> On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers. Click the worker's name link. On the Worker Information page/Individual Training Plan tab, enter the applicable training plan year value in the Enter Training Plan Year field. Enter applicable data fields/values. Click Save and then click Close.
Tips & Guidelines		
<p><i>After completing the Person Management page to create the record for the new worker, you will be returned to the Search Person page. Click Continue to return to the Maintain Worker Information page.</i></p> <p><i>Access the Maintain Worker Information page by clicking Maintain > Worker. Click the Search link on the Maintain Worker Information page to search and retrieve the worker record to update.</i></p> <p><i>Click Insert to add an additional course listing.</i></p> <p><i>Click Insert to add a line for new training plan information.</i></p> <p><i>To add a plan for a new year, type the year in to the Enter Training Plan Year field and proceed to insert new information.</i></p>		
Reports	How Do I...?	Selections
	Review Case Closure Exception Report	No eWiSACWIS selections/entries apply. This report identifies why a case closure has been denied. It is accessible from the eWReports link on the Desktop.
Tips & Guidelines		
<p><i>Counties may contact the Help Desk to be added to the distribution list for this and other reports.</i></p> <p><i>The reasons a case closure was denied can be viewed on the Case Closure page in the Closure Denial Messages.</i></p>		



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How Do I Guide

Payments

Payments

How Do I...?	Selections	Tips & Guidelines
Initiate payment request	<ul style="list-style-type: none"> Click Create > Case Work > Payment > Payment Request. Click the appropriate case and case participant. Click the Create button. On the Payment Request page, click the Search link in the Provider Information group box. On the Provider Search page, enter the applicable data/values and click the Search button. Select the radio button for the provider. Click Continue. On the Payment Request page, enter the applicable data/values. Select Approval from the Options list. Click Go. Click the Approve radio button. Click Continue. Click Save and click Close. 	<p><i>Payment requests can also be initiated via Create > Provider Work or Financial Work.</i></p>
Cancel payment	<ul style="list-style-type: none"> Click Maintain > Check > Pending Checks. On the Review Pending Checks page, click the Search link for the Provider field. On the Search page, enter the applicable data/values and click the Search button. Click the appropriate provider icon to expand the outline and click the radio button for the applicable check (one with pending status). Click Continue. On the Review Pending Checks page, scroll right to the Payment Status field. Click Payment Status value. Click Cancel-Do not Pay. Click Save and then click Close. 	<p><i>The cancellation must be completed within one day of the original payment request.</i></p>
Initiate overpayment adjustment	<ul style="list-style-type: none"> Click Create > Provider Work > Payment > Overpayment Adjustment and select the provider. Click the Create button. On the Provider Overpayments page, enter the applicable To/From dates. Click the Search button. Enter the applicable data/values. Select Approval from the Options list. Click Go. Click the Approve radio button. Click Continue. 	



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